(This includes additional instructions for Transition orders only. See last two pages.)

(Use CAPITAL LETTERS and TAB to maneuver through screens)

- 1) Select Add on the Main Header Screen– Your 3-digit Site code will default in the Dept/Loc field.
- 2) **TAB** to the **Requisition Number** field for your new req. #. Write it down for future reference.
- 3) General Commodity Type 300 and TAB. The General Description will self-populate.







Requisition Entry [TEST DATABASE Jul 17 2022]

- 16) Takes you to the Line Item Screen. (If it doesn't, select Line Items.)
- 17) Quantity :1
- 18) Description: Enter short description of what you are buying, your site name, school year and authorized signers.

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- 19) Unit Price Estimated \$ amount for <u>entire school year</u>. 20) UOM: Enter LOT
- 21) Highlight taxable field and use the space bar to remove tax.

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26) Takes you back to the Main Header Screen - Release.



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29) Verify **Status is 8 – Approved**. If **Status is 6 -Pending**, view **Approver Button** at bottom of screen. You will need to make next approver aware of pending status to avoid delays in PO processing.

Accounts	Total amount	300.00			<u>`</u>
My Approvals	Approve	Reject	Forward	Hold	Approvers

1 of 1 |< < > >|

Asterisk indicates that additional notes exist for the line item.

REQUISITION ENTRY: OPEN PURCHASE ORDER ADDITIONAL INSTRUCTIONS FOR TRANSITION ORDERS ONLY (2021.5)

REQUISITION ENTRY – UTILIZE GENERAL NOTES BOX FOR NEEDED TRANSITION TEAM ORDER JUSTIFICATION-WHEN GENERAL NOTES ARE ASSOCIATED WITH A REQUISITION, THE GENERAL NOTES FOLDER ON REQUISITION HEADER IS YELLOW

Confirm	Search Actions	Output Office	Tools					
Main Terms/Miscellaneous								
Main Information								
Dept/Loc	650 31-35 PURCHASING		Status	2 Created				
Fiscal year	2022 Current Next		Needed by					
Requisition number	201223		Entered	03/15/2022	By LeeannErrotabere			
General commodity		TINO	Convert to	Purchase Order	V.			
General description	SAMPLE REQ FOR TRANSITION PROGRAM MEE	ING	PO expiration Receive by					
Ceneral Notes			1.000.110.07	Three way match rec	puired			
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				Project accounts app	blied			
Vendor Information							Shipping Info	mation
Vendor	99999 🧭 🔳 Committed						Ship to	WW
Name	VENDOR UNKNOWN							CENTRAL WAREHOUSE
PO mailing	0							1690 DAVID E. COOK WAY
								RECEIVING HOURS: 7:30 - 3:00
								CLOVIS CA 93611
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VENDOR SOURCING NOTES FIELD IS UTILIZED FOR CONSISTANT WORDING RELATED TO VARIOUS REQUISITIONS. THESE NOTES ARE MAINTAINED BY PURCHASING DEPT – SUCH AS OPEN PURCHASE ORDER LANGUAGE

WHEN PROCESSING OPEN PURCHASE ORDERS, TRANSITION STAFF COULD ADD INFORMATION RELATED TO MEETING SCHEDULES IN LINE ITEM DETAIL INSTEAD OF PROCESSING A REQUISITION FOR EACH MEETING

Confirm	Search	Actions	Output	Office	Tools	
Requisition						
Fiscal year 2022	Number	201223	Line 1			
Detail						
Quantity	1.00			Unit price	1,000.00000	
Commodity		😂		UOM	LOT	
Inventory item		🖻		Freight	.00	
Location				Discount percent	.00	_
Turne	O Pick ticket			Taxable amount	1000.00	0
Type	O Purchase			Sales tax amount	0.0	0 Modify tax groups
Product ID				. Credit	.0	D
			^	Line item total	1,000.0	0
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				Amount justification:	UNKNOWN	
Description	TRANSITION TEAM AND SIGNES JANE DOE & JO SCHEDULED MEETING DO	PARENT MEETING S DHN DOE ATES: 3/24/2022 &	4/17/2022			
	🖨 Add'l Desc/Notes					
Miscellaneous						
Manufacturer					Bid	
Manufacturer item no.					Dept/Loc	650 31-35 PURCHASING
Vendor	99999	VENDOR UNKNOW	N		Required by	
PO mailing	0				Requested by	
Delivery method	Print			^	Receipt notification to	
	Fax				Fixed asset	NV
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Remit	1	VENDOR	JNKNOWN			
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